Big, Small, & Connected Brands

Is your brand meeting consumer expectations?

By Filip Lau & Katy Osborn

Introduction: How consumers think about brands

IT'S LONG BEEN COMMON PRACTICE for brands to assess themselves against industry competitors. Smirnoff compares itself to Absolut, Under Armour to Nike, Pepsi to Coke. But what happens when a company asks consumers to assess their brand?

A year ago, ReD Associates teamed up with one of the world's most renowned consumer-facing brands to answer this question. A key goal was to understand how consumers today think about and evaluate brands, and ultimately, what people expect from a brand in our client's league. The research combined existing sales figures, market reports, commercial intelligence, and consumer insights with more than 180 new hours of semi-structured interviews and participant observation with consumers across Shanghai, New York, and London. Asking consumers to walk us through their homes, closets, routines, recent purchase histories, and more, we watched closely, and asked questions like: What do you know about Company X? What do you like or dislike about it? How does it compare to that other company you just talked about?

The research revealed that while the average consumer is no stranger to the act of comparing industry competitors, their broader expectations for brands often come from subconsciously bucketing them across, rather than within, industries. They furnish their homes, wardrobes, smartphones, and days with the help of three main types: ubiquitous, global 'big brands;' refreshing and novel 'small brands;' and what we have come to call 'connected brands:' a more subtle third category of both big and small brands, whose engagement models are prompting consumers to expect a new level of interaction with companies — and not to mention, have made them clear winners in the age of COVID. In a landscape where more and more corporations are shapeshifting across industries (think: Google — now Alphabet — moving into mobility and healthcare), and others are claiming industry labels that don't intuitively apply (think: the now-downtrodden WeWork, then Glossier and Peloton, calling themselves "tech companies"), these cross-industry categories hold increasing explanatory power for consumers.

As marketeers use the current pandemic to reflect, reframe, and reset, they would be well-served to understand the categories of big, small, and connected brands, and the expectations that consumers hold for each one. Many companies, however, get so focused on industry-centric comparisons that they lose sight of the broader ways consumers actually perceive them. At the start of research, our client had fallen into this trap. Riding a wave of momentous growth, they'd spent much of the last decade neck and neck with their closest rival, only to arrive at an unexpected plateau. With the annual strategic planning process on its doorstep, their brand strategy team faced a set of questions it wasn't entirely sure how to answer — and that it couldn't simply answer by looking to competitors. What do consumers expect from us as a brand? And: Are we on track to deliver?

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Together the client team and ReD built a tool called the Outside-in Brand Audit. It can be adopted by a wide variety of companies to assess, adjust course, grow, expand into new territories, and prioritize strategic initiatives. To build the tool, we used our findings to identify the top three requirements core to meeting consumers' expectations for big, small, and connected brands. Each requirement constitutes an assessment criterion that can help companies determine whether their brand is meeting consumers' baseline expectations — and, if it isn't, to highlight a priority for getting back on track. The first step to using this framework is to determine your brand's primary category, by asking: *What category of brand do consumers consider us to be?*

Though characteristics of your brand may fall into more than one category, most companies primarily identify with one. You should prioritize meeting the expectations of stakeholders within the category that feels most dominant across your brand.

Consumers' requirements for

Big Brands

NEARLY EVERY CONSUMER in the study instinctively recognized the term 'big brand,' and aside from some cultural variations, had a relatively shared understanding of who these brands are. IKEA, Google, Coca Cola, Chanel, BMW, and Amazon are "big brands," along with many others. Big brands are iconic. Typically global, they are pervasive not only within consumers' buying patterns, but across the media and pop culture people interact with every day. And yet, because of factors like size, age, and ubiquity; big brands can also risk feeling distant, stale, or even antiquated to consumers. (As one NYC respondent put it: "I wouldn't go to Starbucks looking for inspiration.").

The big brands that consumers continue to consider relevant — and yes, sometimes even inspirational —leverage their stable, known presence to meet three key requirements:

1) They tell a solid story

Telling a simple yet powerful story about what a big brand stands for and promises to consumers is paramount to being successful in this category. If you were to hear "Democratic Design," what brand comes to mind? How about "Learning through Play?" Or "The Future of Computing?" The most successful big brands have stories that are spacious enough to host a range of ambitions and evolve to stay relevant over time, but always clear enough to be recognizable to consumers — because this story is powerful at its core, and told consistently through everything the brand does, says, and makes. Bonus points: The best of the best in the big brand category find ways to make their brand story more solid by continuously plugging it into the global discourse, using new contexts to enrich its meaning and depth. Nike did this with its Colin Kaepernick campaign, making "Just Do It" all the more powerful.

2) They deliver reliable products

Successful big brands make products and services that people can count on — a characteristic that is only increasing in importance given the pragmatic nature of Gen Zs. According to our research, reliability is most often recognized by consumers in a few key forms. For fashion brands, comfort and fit most frequently signaled reliability among the respondents we met. Across consumer goods and tech, long-lastingness, and convenience of purchase and use matter. In categories where any sort of risk is involved, be it cars or running shoes, assurance of safety is key. And most importantly, successful big brands provide consistent reliability across all of their product categories — not just some.

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3) They drive positive impact that's proportionate to their success

Consumers increasingly expect big brands to play a role previously attributed to government institutions and non-profits; taking on the burden of championing social, political, and environmental issues that are related to their core brand story. (According to the 2019 Edelman Trust Barometer, 76% of people worldwide believe CEOs should take the lead on change, instead of waiting for governments to create it. In March 2020, 71% of respondents to a separate Edelman study said that their future trust in brands hinged on them putting employees and suppliers over profits during the crisis ahead. In June, 60% of consumers said the same was true for companies taking a stand against systemic racism.) This expectation isn't one that can be satisfied by peripheral CSR initiatives, let alone gimmicks or greenwashing — consumers' standards are on the rise, and they expect big brands to mobilize resources that are proportional to their size, power, and wealth to drive impact in the world. There's a lack of clear evidence to date that these expectations are translating directly to consumer spending — in fact, our research suggests that considerations of a big brand's impact are often still overlooked if its products and services are considered reliable, and especially if they're cheaper or more convenient. Yet at a time when businesses are widely seen as competent but unethical, many of the consumers we met in our study displayed a strong emotional affinity for big brands like Patagonia, Tom's, and Ben & Jerry's — B-Corps that took on financial or reputational risk to drive global change long before COVID. As more and more big brands find ways to do so without compromising the reliability of their products, and public concern around issues like climate change continues to surge, we expect that consumption habits will increasingly discriminate against big brands who don't.

Consumers' requirements for

Small Brands

CONSUMERS HAVE A LESS CLEAR-CUT definition for small brands. A small group of this study's respondents thought first of small brands as being local, pointing to their neighborhood coffee shops and boutiques. (This definition has no doubt gained traction during COVID, with "shop local" becoming a rallying cry to support small businesses on the verge of collapse.) A larger contingent associated small brands with entrepreneurship or 'underdog' status, and named start-ups and direct-to-consumer brands when prompted — even those, like the mattress brand Casper, that have scaled rapidly and are no longer particularly small. A few respondents highlighted the 'small brand' nature of branded goods encountered out of context, or acquired unconventionally: A teenager we met in London proudly displayed a Florida State sweatshirt she'd bought from a secondhand store in Paris as a "small brand" item.

Still, across these definitions runs a common thread. While small brands risk being seen as amateurs, they also offer a refreshing alternative to the distant, stale experience of big brands at their worst. They were already playing a growing role in consumers' lives pre-pandemic, when we carried out our study: The New York Times estimates that some $17 billion in sales shifted from big consumer brands to small ones between 2013 and 2017, and that this trend has only accelerated since. Now, 72% of consumers predict they'll buy from small businesses even more after the pandemic.

Small brands, at their best, simplify and enrich people's purchasing decisions amid the experience of everyday overload. They do this by meeting three requirements:

1) They tell a straightforward story

If successful big brands tell a solid story about what they stand for and offer to consumers, successful small brands tell a straightforward story. The distinction is that a successful small brand story is more focused, functional, and concrete than that of a big brand, usually highlighting a single consumer problem that the brand is solving with as little as a single product or purchasing experience. Bonobos set out to make better fitting pants for men. Casper made mattresses that could be delivered to your door. That deli around the corner makes a great breakfast sandwich. The ease with which our research respondents recalled such straightforward brand stories highlighted that they stick, and they travel. The reason that refrains like "Spotify, but for art" or "Chipotle, but for salads" have so much explanatory power is because these brands were once small brands with extremely straightforward stories. Today, it's straightforward small brands like Magic Spoon — a brand that makes healthy versions of the cereals millennials ate as children — that are

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continuing to thrive. (In contrast, we'd argue that attempting to tell too lofty, broad, or emotional a story too early — rather than tapping into a unique consumer problem or aspiration to build brand loyalty organically — was the downfall of a number of brands in the recent "DTC reckoning.")

2) They deliver products that stand out as special

While many of the respondents we met believed small brand products to be a 'riskier' purchase than big brand products, this risk typically felt diminished or 'worth it' when a small brand's products or services felt special. There's no formula for what makes a product special, but two definitions stood out to us as particularly indicative of the cultural moment we're in. Among Gen Zs especially, the most exciting small brands gave them the tools to signal that they were unique, bold, or ahead of the curve in their taste and/or values — much of why they like buying secondhand is because it helps them signal both. These same respondents spoke to us about feeling that platforms like Instagram were moving the world around them towards an uncanny sameness. A second way we saw small brands deliver special products was by signaling specialization. A good example of this is Ten Thousand, a men's sports apparel brand that started by making "the perfect pair" of gym shorts. Another is The Ordinary, a Deciem skincare brand whose products, The Economist pointed out last year, "look like they belong in some austere Swiss mountain clinic run by professional pharmacists." In an age where endless distractions made deep, focused commitment to any one pursuit seem rare to many of the people we met, a sense of specialization had the power to make a company seem all the more legitimate and trustworthy. (This is something ReD has seen echoed in our tech studies on trust and authority in a digital age.)

3) They offer a close, human option

Often lacking the resources and audience to have the sort of social or environmental impact big brands have in the world, consumers expect small brands to pick up the slack where big brands often fail: Small brands are supposed to feel more grounded, accessible, and human than big brands — almost like you know each other personally. The most subtle way small brands achieve this is through offerings and marketing that speak to specific consumer realities, positioning them as "local" to a generation, mindset, lifestyle, or place. One New Yorker we met talked about recognizing an affinity for the creators of the brand Away, which very clearly targets a nomadic, millennial lifestyle with its pragmatic, tech-forward luggage; another pointed us to "future-forward bodywear" company Chromat, which taps into a timely desire for more authenticity and diverse representation from brands. Some small brands ground themselves by giving consumers a peak behind the curtain — much like your favorite local restaurant has an open kitchen, JuicePress showcases videos of its factories in-store; Everlane experimented with cost transparency and pricing strategies, where consumers can choose how much they want to pay. Many small brands showcase human faces and origin stories: be it your local coffee shop, where you know the barista and backstory; or companies like Outdoor Voices and Glossier, whose founders are highly visible and active on social media, and have detailed their journeys publicly on NPR's "How I Built This" podcast. Backlash over the last year against brands including Away, The Wing, and Everlane shows just how integral this sense of humanity is to the mythology of a small brand; when it falls short, brand appeal can quickly follow suit.

Consumers' requirements for

Connected Brands

WE DEFINE CONNECTED BRANDS as brands whose products, services, and engagement models put them in close, continuous interaction with consumers — and in turn, are shifting consumers' expectations around how a typical relationship with a brand looks. (Connected brands can be of any size, and can simultaneously be thought of as "big brands" or "small brands.") While "connected" isn't a label that consumers consciously apply to brands in the same way they apply the labels "big" and "small," these brands are increasingly prevalent in consumers' lives today as companies recognize the potential long-term pay-offs of establishing more thorough relationships with consumers (including making use of the data that comes out of them). The label "connected" speaks to a category of brand they recognize as continuously and intimately present in their lives, but that many have yet to name for them-selves.

Examples are tech companies like Apple, Spotify, and Netflix whose services have become a quotidian companion for many consumers, and who have access to a tremendous amount of personal data to which they can respond and even serve back to their consumers. Membership-based brands like cycling club Rapha and experience companies like AirBnB are also connecting with consumers through networked spaces and experiences that facilitate in-person, human interactions (though under considerable limitations during the pandemic). When companies like WeWork, Peloton, and Glossier have said they're building "tech" brands, we'd argue that what they meant to say is that they aspire to build "connected" brands — brands for whom particularly close and/or frequent contact with their consumers is core to how they drive value.

Connected brands can risk crossing consumer boundaries, and are often either difficult to convince consumers to pay full-price for, priced at a premium, or both. In 2020, it's also become clear that connected brands who rely primarily on shared spaces and in-person connection, such as The Wing, are enormously vulnerable. And yet, we observed that connected brands at their best help consumers link disjointed moments and experiences into something bigger, like a sense of community, routine, identity, or personal growth. The most successful connected brands meet three requirements:

1) They are dynamic

The connected brands that respondents spoke most highly of don't just maintain close contact with consumers — they make sure to continuously respond, ensuring that this contact fuels new and better products or experiences for consumers. When a connected brand does this successfully, its brand story starts to exist on two levels: i) an overarching brand story, and ii) a more dynamic, personalized story about a brand's relationship with

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– *Rapha* Founder Simon Mottram

you, the consumer. Spotify is a great example of this — through "Discover Weekly," it continuously offers up personalized recommendations based on past listening behavior; through its annual "Wrapped" campaign, it offers users in-sights into their personal listening habits and highlights for each year. Research suggests that when a brand feels dynamic, it can have the dual effect of making users more comfortable with their data being collected while also driving engagement — Discover Weekly listeners, for example, spend twice as much time on Spotify as users who don't. (In the DTC category, Glossier is known for being similarly responsive to its highly engaged consumer base — a reputation that dates back to its origins in "Into the Gloss," a beauty blog grounded in the idea that there aren't 'bests' in beauty so much as personal favorites, preferences, and fits.)

2) They are empowering

Connected brands grant consumers access to superior experiences, removing existing pain points from the equation or unlocking new possibilities altogether. In a pre-pandemic world, ClassPass was known for facilitating access to boutique fitness classes where many of the people we met described fitness culture as "expensive and elitist," and at the same time, unlocked new levels of variety in people's fitness routines. During the pandemic, AirBnB has adapted to travel restrictions while capitalizing on the possibilities opened up by remote work, helping people find longer-term, WiFi-equipped getaway options closer to home. Two respondents in our study (one in Shanghai, and one in New York) brought up FitBit as a brand they loved, both because it offered them greater insight into their health (making it less of a "black box"), and because it allowed them to feel a sense of progress throughout their "health journeys." Another respondent we met spoke about how much they loved Spotify's "Behind the Lyrics" partnership with Genius — it meant they never had to Google the lyrics, while also allowing them to learn things about songs and artists they might never have thought — or been able to — Google.

3) They are unobtrusive

The final characteristic of a successful connected brand is that it connects with consumers in ways that feel natural and intuitive while asking for little in return. This means keeping consumer input low-maintenance (why food-tracking apps have never gained quite the same traction as, say, Strava), offering low-commitment options (e.g. pay-as-you-go), providing transparency and a sense of control over how personal data is collected and used, and pushing experiences instead of purchases. The founder of premium cycling club Rapha has talked about his brand's commitment to this last principle particularly, saying: "For us it's about building relationships over time. Encouraging that person to come back. Helping them to fall in love with the product through contact, before they place the transaction." Other companies forge natural-seeming connections with consumers through social media experiences that consumers want to be a part of, and that thus prompt consumers to 'opt into' a relationship: Outdoor Voices' #doingthings hashtag, for example. Though the hashtag has been used just over 200k times on Instagram, it beats #outdoorvoices by a multiple of 6.

Taking action: Assessing and developing your brand

Step 1: Assessing your brand against these requirements

Now that you understand what makes each brand category successful, the first step to using this tool is to consider whether or not your brand meets the top three requirements for its category.

A big brand, for example, can start by asking itself:
1. Do we tell a solid story?
2. Do we deliver reliable products and services across all categories, and particularly those that help authenticate our brand story?
3. Do we feel sufficiently impactful in the world?

(If you're not quite sure what category your brand falls into, figuring this out should be your first course of action. Ask yourselves: What category of brand do consumers consider us to be?)

We'd recommend a company's leadership team sit down together to ask these questions at the start of any strategic planning process, and that they draw heavily on consumer perspectives to answer each one. The reason for this is simple: Brands — and especially those with strong, relatively homogeneous cultures — often lack a clear sense of how they're perceived by consumers. Having a firm internal sense that your company has a solid story, for example, does not guarantee that your consumers have a strong sense of what your brand stands for and promises to consumers. This consumer perspective can be gathered from existing consumer data, or from additional research qualitative research such as surveys, focus groups, or semiotic media analysis.

In the case of our client, taking this step dealt a blow to their self-understanding. At first pass, many of the brand strategists we worked with were willing to answer a "yes" or "I think so" to all three questions. But on the ground, it turned out, even consumers who loved the brand were deeply confused about what it stood for. They were disappointed in the quality of products in a number of categories at the core of our client's identity. And while our client was investing heavily in sustainability, consumers had little idea. This fresh understanding helped our client understand the strategic importance of addressing these three mismatches above all else.

Getting your brand to a place where the answer to all three of these questions for your primary brand category is "yes" should be a top strategic priority for your brand.

But three yeses is just a starting point. There also needs to be consistency in how your brand is meeting these three requirements. For a big brand, for example, the brand story should influence the particular ways in which the brand's products and services are considered reliable, as well as the particular forms of impact it has in the world. Think of Starbucks. Being a "third place" is core to the brand's story, which means that reliable free WiFi is as, if not more important, for many consumers than reliable coffee taste. Their social impact vision, meanwhile, is focused on serving and strengthening communities: "We have always believed Starbucks can – and should – have a positive social impact on the communities we serve. One person, one cup and one neighborhood at a time."

Questions to ask your brand:

1. What category of brand do consumers consider us to be?
2. Are we meeting consumers' expectations for our category?
3. Are we consistent in how we meet those expectations?

Consumer requirements for each brand type

	BIG BRANDS	SMALL BRANDS	CONNECTED BRANDS
Its story should be...	*Solid:* Does the brand tell a clear, powerful, and consistent story about what it stands for and promises to consumers?	*Straightforward:* Does the brand communicate a simple, concrete focus (e.g. a single consumer problem or aspiration that the brand is solving for)?	*Dynamic:* Does the brand establish a dialogue with consumers, evolving and personalizing in response to its interactions with them?
Its products and services should be...	*Reliable:* Do consumers feel like they can count on the brand to deliver quality and convenience across all product and service categories?	*Special:* Do consumers think of the brand's products and services as special — either because they're unique, or because they're the result of specialization?	*Empowering:* Do consumers feel that the brand's products and services connect them to superior experiences, removing pain points from the equation or unlocking new possibilities?
It should feel...	*Impactful:* Do consumers believe that the brand is leveraging its power to drive proportionate levels of change in the world?	*Close:* Do consumers feel like the brand knows and understand their realities, and like they know and understand the humans and processes behind the brand?	*Unobtrusive:* Do consumers feel like they can participate in and interact with the brand in a way that feels natural to them?
These requirements should be met with	*Consistency:* Is the brand consistent in how it delivers on these consumer requirements, making sure that they complement one another and closely align with the brand's overarching story?		

Step 2: Looking beyond a primary brand category

Once on track to meet all three consumer requirements for brands in its primary category in a consistent way, your brand can also look to the requirements of other categories to see how it stacks up. Any brand's secondary and even tertiary categories can be determined by asking: "What category of brand do we aspire to be?" and "What category of brand do we feel threatened by?" (For a brand on the offensive, the former question should determine its secondary brand category; a brand on the defensive should look to the latter.)

Using this logic, a big brand might assess itself against the consumer requirements for small and connected brands to see where it is most vulnerable to competition and disruption. A small brand, meanwhile, might look to the requirements of a big brand to see how it might need to evolve as it grows — moving, for example, from a straightforward, product-centric brand story (e.g. "great leggings") to a more spacious, solid story about what its brand stands for and promises to consumers (e.g. "recreation"). Reliability of its products and services will also become much more important as it grows, and global impact will become non-optional.

For our client, the proliferation of small brands within their industry (as in many others) meant that they increasingly represented a threat. Connected brands, meanwhile, represented an elusive relationship with customers that they, too, aspired to build. Understanding consumer expectations for these brand categories allowed them to identify opportunities to fend off competition by acting more like a "small" or "connected brand" — for example, finding ways to better empower consumers using its digital offerings.

Questions to ask your brand:

1. What category of brand do we aspire to be?
2. What category of brand do we feel threatened by?
3. How are we delivering on consumers' expectations for brands in these categories?

Pros and cons of each brand type

	BIG BRANDS	SMALL BRANDS	CONNECTED BRANDS
At their best...	...are inspiring and iconic — leveraging their stable, known presence to pursue a clear mission, raising the bar on product quality and impact	...offer a refreshing alternative to the distant, abstract experience of big brands at their worst — using proximity to consumers to simplify and enrich decision-making amid the experience of everyday overload	..empower consumers by helping them connect disjointed moments and experiences into something bigger, like a community or lifestyle
At their worst...	...feel distant, stale, and even antiquated to consumers	...are seen as amateurs, often less reliable than big brands	...risk crossing consumer boundaries, aren't always intuitive for consumers to pay for directly

Step 3: Evaluating brand subcomponents

Next, it's time to get granular. Your brand can also use the full set of consumer requirements to sort and filter its smaller initiatives or brand subcomponents according to whether they are most likely to help the brand act like a big, small, or connected brand, and assess how well each one is doing so. For example, our big brand client used the consumer requirements for small brands to assess how its smaller franchises or seasonal concepts were performing, and to develop new ones, asking — does each franchise or concept deliver the brand story in a way that has a straightforward focus, feel close and human to consumers, and deliver something both refreshing and unique to the brand? Similarly, it looked to consumers' requirements of a connected brand to assess its brand apps and membership programs — are they empowering, dynamic, and unobtrusive in how they connect with consumers?

Questions to ask your brand:

1. Do our brand initiatives or subcomponents , e.g. franchises, help us act like a Big, Small, or Connected brand?
2. Are they helping us deliver on consumers' expectations?

Step 4: Focusing efforts and clarifying brand priorities

Finally, assessing the potential of brand initiatives or subcomponents to deliver on consumer requirements across brand categories can also help your brand prioritize its strategic initiatives. Try filling out the pyramid below with the nine consumer requirements, giving highest priority to: 1) requirements for your brand's primary category, 2) the requirements that align most closely with your brand's values and aspirations, and 3) the requirements your brand is most notably failing to deliver on. (In the case of our client, for example, telling a solid story sat on the top of the pyramid and was thus given the highest weighting; making reliable products & services, and being impactful, empowering, and close sat in the middle tier; and so on.) Then, assess each of your strategic initiatives against all nine of the consumer requirements outlined here — asking questions like, "Could pursuing this strategic initiative help my brand tell a clear, powerful, and consistent story to consumers?" — and apply the weighting outlined by the pyramid. The result should be a clear ranking of brand initiatives, the highest being those that can best help your brand meet the consumer expectations most appropriate to your brand.

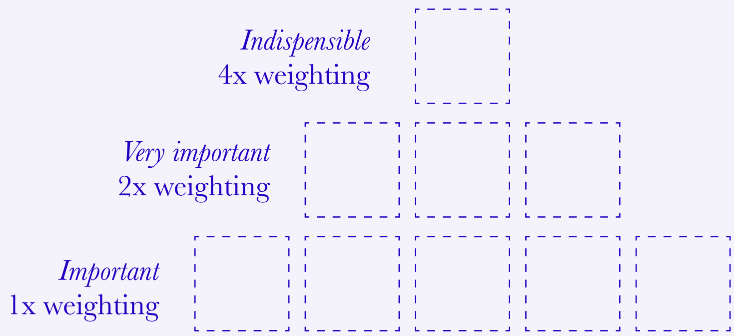
For our client, this pyramid allowed them to pivot from a strategy that prioritized 13 initiatives equally to a clear ranking, with initiatives that supported clarifying and strengthening their brand story for consumers at the very top.

Questions to ask your brand:

1. Which of our brand initiatives or subcomponents help us deliver on consumer expectations that are *most important* for our brand?

Prioritization pyramid

Fill out this pyramid with the nine consumer requirements, giving highest priority to: 1) requirements for your brand's primary category, 2) the requirements that align most closely with your brand's values and aspirations, and 3) the requirements your brand is most notably failing to deliver on. Then, assess each of your strategic initiatives against all nine of the consumer requirements outlined here and apply the weighting outlined by the pyramid.



Conclusion

IT CAN BE TEMPTING to flatten brand performance into sentiment trackers, brand associations, and market share comparisons — and these measures certainly have their place in assessing a brand's performance. But developing a comprehensive understanding of how your brand is delivering on consumers' core expectations requires a more systematic and critical approach, one that shakes away industry blinders to reflect the way that consumers increasingly experience brands today.

Taking such an honest, high-level look at your brand is no easy task. But the result — a brand that truly understands and responds to consumers' experience of an increasingly complex and competitive marketplace — is a brand with true staying power.

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